

California Department of Transportation

Partnering Facilitator Checklist

- ☐ Submit Facilitator Registration Form to Caltrans Partnering Program
- ☐ Facilitate kick-off partnering workshop
- ☐ Develop partnering charter:
 - ☐ Mutual goals
 - ☐ Include core project goals (safe, on time, on budget, quality met)
 - ☐ Include project-specific definitions of all mutual goals
 - ☐ Partnering maintenance and close-out plan
 - ☐ Dispute resolution plan
 - ☐ Include dispute resolution ladder
 - ☐ Commitment statement and signatures
 - ☐ Submit partnering charter to Caltrans Partnering Program
- ☐ Set-up monthly partnering evaluation survey:
 - ☐ Get email addresses of survey participants and report recipients
 - ☐ Mutual goals
 - ☐ Includes core project goals and the associated objective criteria of success
 - ☐ Includes any project-specific goals and mutually supported individual goals and the associated objective criteria of success
 - ☐ Optional - key issues/risks (update as needed quarterly)
- ☐ Facilitate close-out partnering workshop, if requested
 - ☐ Document lessons learned (no standard format required)
 - ☐ Send lessons learned to project team
 - ☐ Send lessons learned to project executives
 - ☐ Submit lessons learned to Caltrans Partnering Program
- ☐ Submit final partnering evaluation survey results on core project goals to Caltrans Partnering Program using standardize submittal format to Caltrans Partnering Program

Monthly Reminders

Review survey results

- Take action as appropriate

Submit survey participation-levels to Caltrans Partnering Program

- # team members invited to take survey
- # team members that submitted a completed survey

Quarterly / Periodical Reminders

Update key issues on monthly partnering survey

Hold follow-up partnering sessions and/or facilitated dispute resolution sessions

Check in with the RE, PM, and other team members as appropriate to keep informed on project progress